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Co-Sponsoring Organizations

- ABA Section of International Law & Practice/International Private Clients Committee
- State Bar of California Family Law Section
- L.A. County Bar Assn. International Law and Trusts & Estates Sections
- International Bar Association Committee on Individual Tax and Estate Planning, Wills, Trusts and Succession
- Asia Society of Southern California

Crossborder Estate, Financial and Asset Planning Conference

Presented by the International Law and Trust & Estates Sections of the State Bar of California

June 15, 2006

8:30 am – 6:00 pm

The Ritz-Carlton, Marina Del Rey

4375 Admiralty Way | Marina Del Rey, CA 90292 | (310) 823-1700

Registration information | www.calbar.ca.gov/ils
| www.calbar.ca.gov/trusts
| www.calbar.ca.gov/famlaw

Webcast information | www.calbar.org/online-cle

6.5 Hours MCLE including Ethics

This Program will survey areas of particular importance for crossborder financial, estate and asset planning for U.S. and international private clients and their advisers. Particular areas to be addressed will include: U.S. and international income, estate and gift / inheritance taxes; pre-immigration / emigration planning; foreign investment structures; immigration; crossborder family law matters (including separate / community property, pre- and post-nuptial agreements, divorce and custody issues); offshore trusts, holding vehicles and management structures; special multijurisdictional planning considerations; international private banking; crossborder professional ethics issues; multi-generational wealth management and succession planning; international family office issues; crossborder philanthropy. Anticipated attendees will include U.S. and foreign lawyers, accountants and other professionals, investors, bankers, wealth managers and financial advisers, trust officers, philanthropy advisers, family office representatives.

Proposed Program Schedule

8:30am-9:00am

Breakfast/Registration

9:00am-9:15am

Introductions

Peter A. Gelles (Chair, California State Bar International Law Section), Chair and Moderator
Charlotte K. Ito (Steeffel, Levitt & Weiss, San Francisco; Member, Executive Committee, California State Bar Trusts & Estates Law Section), Co-Chair and Co-Moderator

9:15am-10:45am

Panel 1:

U.S./Non-U.S. Tax Background

- U.S. Income, Gift and Estate/Inheritance Taxes for U.S. and Non-U.S. Taxpayers
- Coordination of U.S. and Non-U.S. Tax Planning
- Pre-Immigration and Pre-Emigration Planning

Speakers: Roger A. Feusier/Paul A. Roberts (PriceWaterhouseCoopers, San Francisco)
Paul A. Sczudlo (Co-Chair, ABA Section of International Law & Practice, International Private Clients Committee; Loeb & Loeb, Los Angeles)
Barbara R. Hauser (Special Counsel, Cadwalader, Wickersham & Taft LLP, New York)

11am-12:30pm

Panel 2:

Other U.S./Crossborder Legal Considerations

- Foreign Investment Structuring
- Immigrant and Non-Immigrant Visas
- Crossborder Family Law Issues (including U.S. and non-U.S. pre-nuptial and post-nuptial agreements; crossborder marital dissolutions; custody issues)

Speakers: Lawrence H. Heller (Bryan Cave LLP, Los Angeles)
Mark A. Ivener (Ivener & Fullmer, LLP, Los Angeles)/Jo Hwang (American Life, Inc., Seattle)
Peter M. Walzer (Chair, California State Bar Family Law Section; Walzer & Melcher LLP, Los Angeles)/Mark Harper (Withers LLP, London)

12:30pm-2:00pm

Lunch

- Multi-Generational International Wealth Management and Succession Planning

Speakers: Jeffrey F. Daly (Strategic Wealth Advisory Team, Goldman, Sachs & Co., Los Angeles)
Divesh K. Makan (Goldman Sachs & Co., San Francisco)

2:15pm-3:45pm

Panel 3:

Offshore Trusts, Holding Vehicles and Management Structures; Special Offshore Planning Considerations; Crossborder Professional Ethics Issues

- Offshore Trusts, Holding Vehicles and Management Structures
- Special Offshore Planning Considerations (including separate/community property, joint ownership, forced heirship, residence/domicile/situs, wealth taxes and other issues under foreign laws)
- Crossborder Professional Ethics Issues (including issues regarding crossborder conflicts of interest, multiple party representations, privilege and confidentiality, international fiduciaries, etc.)

Speakers: Pamela Woodburn /Joe Donohoe (Royal Bank of Canada Global Private Banking, San Francisco/Jersey)
Joseph A. Field (Withers Bergman LLP, New York)
Christopher S. Armstrong (Law Offices of Christopher Armstrong, San Francisco)

4:00pm-5:30pm

Panel 4:

International Private Banking; Crossborder Philanthropy

- International Private Banking
- Crossborder Philanthropy Activities
- Legal and Tax Strategies for International Giving

Speakers: David Emmes (Mellon Private Wealth Management, Los Angeles)/Jack E. Sholl (Mellon Family Office, San Francisco)
Judy Belk (Rockefeller Philanthropy Advisors, Los Angeles/New York)
Jane Peebles (Bingham McCutchen, et al., Los Angeles)
Richard Cassell (Withers LLP, London)

5:30pm-6:30pm

Reception

Registration Information

DEADLINE:

Your form and check or credit card information (with signature) must be received by ***Friday, June 9, 2006*** to be guaranteed participation in the program.

ON-LINE REGISTRATION:

For immediate registration, you can use our on-line feature by going to the main State Bar of California International Law Section website at ***www.calbar.ca.gov/ils***.

Or ***www.calbar.ca.gov/trusts*** or ***www.calbar.ca.gov/famlaw***

MAIL TO:

For those of you that will be mailing in your check or credit card information, you may mail to:

Program Registration | International Law Section
180 Howard St. | San Francisco, CA 94105

CHECKS PAYABLE:

Make checks payable to: The State Bar of CA

FAX TO:

Program Registrations at 415.538.2368.

Visa or MasterCard Information with a signature is mandatory.

CANCELLATIONS/REFUNDS:

All requests for refunds should be emailed to ***edward.bernard@calbar.ca.gov*** no later than June 2, 2006. A processing fee of \$75 will be retained.

SPECIAL ASSISTANCE

For special assistance, please call (415) 538-2380, or for the TTD line for the speech and hearing impaired, please call (415) 538-2231. For more information regarding the International Law Section, please call (415) 538-2468.

WEBCASTING

All Sections of this program, except the Luncheon speaker, will be available through webcasting at the State Bar of California webcasting site at ***www.calbar.org/online-cle*** at a rate of \$160 per segment.

TRANSCRIPTS

Transcripts are intended to be prepared and available after the Conference via an outside provider based on audiotaping of Conference discussions provided that a suitable minimum number of pre-orders is received. Please place an order by contacting the State Bar of California International Law Section office via email at ***edward.bernard@calbar.ca.gov***.

VERSATAPE

Audio transcripts will also be available through VERSATAPE after the program. Please call (800) 468-2737.

Crossborder Estate, Financial and Asset Planning Conference

Thursday, June 15, 2006 | Ritz-Carlton, Marina Del Rey

REGISTRATION FORM *Note: One registrant per form. Photocopies may be used.*

Bar Number: _____

Name: _____

Firm: _____

Firm Address: _____

City, State AND Zip Code: _____

Phone Number: _____ Fax Number: _____

E-mail Address: _____

(Required for program confirmation)

Your name and address may be disclosed.

☐ Check here if you do not want your information released.

Registration Fees (check the appropriate box)

Early Bird (before June 2, 2006):

- ☐ (\$350) Section Member of International, Trusts and Estates and Family Law
- ☐ (\$395) Non-Section Members

After June 2, 2006:

- ☐ (\$450) Section Member of International, Trusts and Estates and Family Law
- ☐ (\$495) Non-Section Members
- ☐ (\$525) On-site Registration (On a space available basis)

Credit Card Information (VISA/MasterCard Only)

I/we authorize the State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

Account Number: _____ Expiration Date: _____

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Cardholder's Name: _____ Cardholder's Signature: _____

DEADLINE:

In order to Pre-register, your form and check, payable to the **State Bar of California**, or credit card information, must be received five working days before the program.

REGISTER ONLINE:

www.calbar.ca.gov/famlaw
Family Law website

www.calbar.ca.gov/ils
International Law website

www.calbar.ca.gov/trusts
Trusts and Estates website

MAIL TO:

Program Registrations | State Bar of California
180 Howard Street | San Francisco, CA 94105

FAX TO:

Program Registrations at 415-538-2368. In order to fax your registration, credit card information is MANDATORY. *(Photocopies of checks will NOT be accepted)*

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than **June 2, 2006** and are subject to a \$75 service charge.

NOTE: See additional information regarding registration for Webcasting and pre-ordering of audiotapes, transcripts, etc.



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Who Should Attend

International and estate planning lawyers,
accountants and other professionals; wealth managers
and financial advisors; private bankers; trust officers;
philanthropy advisers; family office representatives

MCLE Credit: 6.5 Hours including Ethics